

# Creating a Close Discharged Client Alert

This alert is for notifying if a discharge has been created more than 30 days ago and the case is still open.

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Agency** to activate the Agency List menu.
2. Select **Alerts Configuration**.
3. Select **Add New Alert**.

The screenshot shows the Idaho-WITS Training interface. On the left, the navigation pane has the 'Agency' menu expanded, with 'Agency List' selected. A red circle with the number '1' is placed over the 'Agency List' menu item. In the main content area, the 'Agency List' table is displayed. A red circle with the number '2' is placed over the 'Alerts Configuration' link in the table's header row.

Actions	Name	Display Name	Description
	A Managed Service Contractor	A Managed Servi	
	Auth Period Testing	Auth Period Tes	
	Bonneville County Community Crisis Center	Bonneville CCCC	
	Business Psychology Associates	BPA	
	D Williams Agency	D Williams Agen	
	Department of Health & Welfare	State DHW	
	DHW Child Welfare	Child Welfare	
	DHW Contractor	DHW Contractor	DHW TEST CONTRACTOR agency for SUD
	Idaho Department of Correction	IDOC	
	Idaho Dept of Juvenile Corrections	IDJC	
	Idaho Hope Project	Idaho Hope	
	Idaho Supreme Ct	ID Supreme Ct	
	IDHW, AMH	AMH Training	
	IDHW, CMH	CMH Training	
	IDHW, DBH, Region 1	DBH, Region 1	
	IDHW, DBH, Region 2	DBH, Region 2	

The screenshot shows the Idaho-WITS Training interface. On the left, the navigation pane has the 'Alerts Configuration' menu selected. A red circle with the number '3' is placed over the 'Add New Alert' link in the table's header row.

Actions	Alert Type	Alert Name	Levels of care	Include case w/o LOC	Active	Assigned to Staff Type	Facility Excluded
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4. Enter **Alert Name**.

5. Select **Close Discharged Case** as the **Alert type**.

6. Enter the message in **What message should appear to users?**

7. Complete these fields.

- **When is the next activity due (days after the trigger point)?**
- **How many days prior to the due date should this alert show up?**
- **Which staff should receive the message?**
- **Should message turn red when overdue?**

8. Select any **Facilities** this alert *will not* apply to. Use the greater than sign (>) to move them to the box on the right.

9. Enter the **Number of Days** you want this alert to show.

10. Enter the **Effective Date**.

11. Select **Finish**.

The screenshot shows the 'Agency Alert Configuration Profile' form in the Idaho-WITS Training system. The form is titled 'Agency Alert Configuration Profile' and includes a sidebar with navigation links. The main form area contains the following fields and sections:

- Configuration Type:** Agency (selected)
- Alert Name:** Close Discharged Case (highlighted with callout 4)
- Alert Type:** Close Discharged Case (highlighted with callout 5)
- Trigger Point:** Discharge Created Date
- Alert Description:** Alert for notifying if a discharge has been created more than 30 days ago and the case is still open
- What message should appear to users?:** Close case/intake for discharged client (highlighted with callout 6)
- When is the next activity due (days after the trigger point?):** 0
- How many days prior to the due date should this alert show up?:** 0
- Which staff should receive the message?:** Case Assigned To (highlighted with callout 7)
- Should message turn red when overdue?:** Yes
- Which facilities follow these rules:**
  - Effective for these Facilities:** Treatment Location 1, Treatment Location 2
  - Excluded Facilities:** Only for facilities you want excluded from this alert (highlighted with callout 8)
- Alert should stop being displayed this many days after it is generated:** 180 (highlighted with callout 9)
- Effective Date:** 02/23/2015 (highlighted with callout 10)
- Expiration Date:** (empty)
- Buttons:** Cancel, Save, Finish (highlighted with callout 11)